

## SYSTEM AND METHOD FOR PERSONAL DEVELOPMENT TRAINING

### Field of the Invention

The present invention relates generally to personal development training and, more particularly, relates to a computer-implemented system and method for training and development of an action plan.

### Background of the Invention

Small and medium sized businesses and corporations spend over one billion dollars per year in outsourced seminar programs. The seminar programs typically take the form of training in areas such as technology updates, management/leadership, sales strategies and initial, web-based on-the-job training. The teaching modalities used in these seminar programs have historically been presented using a T-bar situation analysis methodology and implemented as paper-based flipcharts and/or 3-ring binders of antiquated information. This paper-based approach has demonstrated little effectiveness in changing the behavior and follow up of participants, and is fast becoming outmoded in society's exciting new information age.

Today's generation is being taught by the latest modalities of information access, including Internet, web-based programs and CD-ROM/DVD interactive models. These upgraded modalities, however, have not been applied in the field of sales training. Moreover, although there is approximately a 250 million dollar nationwide market for outsourced seminars, no existing company has integrated their approach with the personal

management systems of the future, such as Palm, Inc.'s Palm™ handheld devices, Internet Commerce Corp.'s ACT!™ contact manager, and Microsoft's Outlook®.

### **Summary of the Invention**

The present invention is directed towards an improved system and method for  
5 processing and prioritizing the goal setting and decision-making process, and for  
developing a high-end strategy or action plan for implementation by a user. The method  
uses a unique step-by-step approach and a methodology based on weights and risk factors.  
It is computer-implemented and is intended to replace outmoded and wasteful seminar  
programs and antiquated paper-based teaching modalities. The methodology and system  
10 disclosed herein may be implemented as stand-alone computer software or, alternatively, as  
a Web-based and accessible program. Preferably, a “wizard” approach is used, that is, the  
method is presented to the user as a screen-by-screen guide ultimately resulting in  
completion and generation of an action plan unique to the user's particular problem or  
issue. This approach evokes creativity and brings the user to emotional levels that facilitate  
15 creative solutions.

Accordingly, in one embodiment of the invention, a computer-implemented system  
for personal development training is provided. The system includes user input comprising  
the user's goal, possible outcomes and influence factors on the possible outcomes, and  
a processor for processing the user input and generating an action plan based on the user  
20 input.

In another embodiment of the invention, a computer-implemented method for  
personal development training is provided. First, user input is obtained comprising the

user's vision and goal, possible outcomes, influencing factors on the possible outcomes and relevant data for each of the influence factors. Next, for each influence factor, the risk associated with the influence factor is reduced to an acceptable level if the risk is too high relative to the importance of the influence factor. Finally, an action plan is generated and  
5 displayed to the user based on the user input.

In another embodiment of the invention, a computer program product comprising a computer useable medium having computer program instructions stored therein for generating an action plan based on user input is provided. The computer program product comprises instructions for obtaining user input comprising the user's vision and goal,  
10 possible outcomes, influencing factors on the possible outcomes and relevant data for each of the influence factors; for each influence factor, reducing a risk associated with the influence factor to an acceptable level if the risk is too high relative to the importance of the influence factor; and generating and displaying an action plan to the user based on the user input.

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### **Brief Description of the Drawings**

The present invention is described with reference to the accompanying drawings. In the drawings, like reference numbers indicate identical or functionally similar elements, and

20 **Figure 1** is a high-level overview flow diagram of a method for generating an action plan according to the present invention.

**Figure 2** is a detailed flow diagram of one aspect of the overview flow diagram of **Figure 1** wherein various data relevant to influencing factors is obtained.

**Figure 3** is a detailed flow diagram of another aspect of the overview flow diagram of **Figure 1** wherein the risk associated with certain influences is reduced.

5        **Figure 4** is a detailed flow diagram of a further aspect of the overview flow diagram of **Figure 1** wherein an action plan is generated.

**Figure 5** is a detailed flow diagram of a still further aspect of the overview flow diagram of **Figure 1** wherein the generated action plan is displayed.

10       **Figure 6** is a software application window illustrating one embodiment of an interactive form that permits entry of vision and goal statements.

**Figure 7** is a software application window illustrating one embodiment of an interactive form that permits entry of possible outcomes.

**Figure 8** is a software application window illustrating one embodiment of an interactive form that permits entry of influencing factors and associated data;

15       **Figure 9** is a software application window illustrating one embodiment of an interactive form that permits entry of more data associated with the influencing factors;

**Figure 10** is a software application window illustrating one embodiment of an interactive form that permits entry of further data associated with the influencing factors;

20       **Figure 11** is a software application window illustrating one embodiment of an interactive form that permits entry of data associated with reducing the risk associated with the influencing factors.

**Figure 12** is a software application window illustrating one embodiment of the final action plan as generated and displayed to a user.

**Figure 13** is a diagram illustrating an example processor-based system according to one embodiment of the invention.

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### **Detailed Description of Preferred Embodiments**

#### **Vision and Goal Statements**

A high-level overview flow diagram 100 of the present invention is presented in **Figure 1**. As indicated at step 102, the first task is to obtain vision and goal statements from the user. One embodiment of a software application screen or window that permits a user to enter vision and goal statements is depicted in **Figure 6**. The “vision” is the user’s ultimate vision of accomplishment. Examples of the type of vision statements that may be entered include “vacation”, “buy a house”, and “save \$50,000 to invest and put the children through school”. The “goal” is a more specific goal that will permit accomplishment of the user’s vision. An example of a goal that might be entered is “reach sales forecast as a computer salesman”. As indicated in **Figure 6** by the presence of the “Add” command button, the user may enter more than one vision and/or goal statement.

#### **Possible Outcomes**

In step 104, after entering the vision and goal statements, the user is prompted to provide one or more possible outcomes (A). **Figure 7** depicts an example software application screenshot that permits a user to enter possible outcomes. The presence of the “Add Outcome” command button in **Figure 7** indicates that multiple outcomes may be

entered from this screen. An example of a desirable outcome that might be entered is “sell top-end system and meet/exceed quota”. An example of an undesirable outcome might be “fail to reach sales goal and lose job.” The user may enter multiple possible outcomes and the system will walk the user through each outcome and consequent results. However, the system will typically only process the best (most desirable) outcome. Thus, in the paragraphs to follow in this detailed description, the examples given assume the most desirable outcome has been chosen for processing by the system, namely, “sell top-end system and meet/exceed quota.”

#### **Decision making criteria**

The decision-making process requires the user to develop certain criteria upon which to rank, develop, and base decisions. It is explicitly contemplated by the present invention that such criteria includes the following non-exhaustive list of common decision-making criteria: ease of use, obsolescence, compatibility, upgradability, acquisition cost, performance, safety and Maslow’s hierarchy of 5 needs. This list is not meant to limit the scope of the decision-making criteria that may be incorporated into the system.

#### **Influence factors**

For each possible outcome the user is prompted to enter one or more influence factors, or “influencers” (B). An influence factor is an obstacle that could stand in the way of the user’s reaching his or her goal. These will usually be key decision-makers, or other people involved in the decision-making process. Examples of influencers include the department manager, the CEO, or the purchasing manager. Obtaining the influencers is accomplished in step 106 of **Figure 1**.

### Relevant data

In step 108 of **Figure 1**, the invention asks the user to input relevant data for each influencer. Step 108 of **Figure 1** is expanded and explained in **Figure 2**. In step 120, the effect the influencer has on that particular outcome is obtained (C). For example, in the case of the department manager as the influencer, the user might enter “make technical recommendations.” In the case of the CEO, the user might enter “authorizes the necessary expenditure”; in the case of the purchasing manager, perhaps “cuts the purchase order.” In step 122, the weight each influencer has on the particular outcome is obtained (D). In one embodiment, this weight is input as a ranking on a scale of one to ten. Thus, the user might assign a weight of 8 to the department manager influencer, while assigning only a 6 to the CEO.

In step 124, a statement about what drives the influencer is obtained (E). As examples: department manager might be driven by “needs new system to make department more efficient”; CEO, “overall impact on company”; and purchasing manager, “fiscal year budget constraints”. In step 126, the timeframe under which the influencer is operating is obtained (F). The timeframe is the date by when the goal will be attained. Using our previous three example influencers, timeframe considerations may lead the user to input a date of “within one week” of the present date in order to satisfy the department manager; “the time of the next board meeting” to satisfy the CEO; and “the last day of the company’s fiscal year” to satisfy the purchasing manager.

In step 128, a statement about how to positively affect the influencer is obtained (G). This statement often takes the form of a creative solution as to how the user can drive

the influencer or bring the influencer closer to achieving the goal. The department manager, for instance, may desire that the new system (mentioned above in connection with (E) for making the department more efficient) be comprehensive in its functionality. The CEO, concerned with overall impact, might boost the organization's image in the community by sponsoring a charity bike ride. Knowing that the purchasing manager is very concerned about budget constraints might prompt the user to input "provide best price, warranty, or free shipping".

In step 130, the weight of affecting the influencer is obtained (H). In one embodiment, this weight is input as a ranking on a scale of one to ten. In step 132, the risk (difficulty) of affecting the influencer is obtained (I). In one embodiment, this risk is input as a ranking on a scale of one to ten. The user may deem a fully-loaded, highly functional system very risky and assign a risk factor of, say, 8 at this step. Furthermore, the implementation of a highly functional system designed to improve departmental efficiency comes with associated risks such as the organizational inertia often exhibited by employees who feel forced to accept a new system. Nevertheless, willingness to accept such a risk can either be high or low, depending on the situation. It is in step 134 where the willingness to take the risk of step 132 is obtained by the user (J). In one embodiment, this willingness is input as a ranking on a scale of one to ten. So, a user may assign a willingness ranking of only 2 (on a scale of one to ten) to indicate to the system an attitude of general unwillingness to accept the risk factor of 8. Finally, at step 136, the invention employs a loop for cycling through steps 120-134 for each influencer that was entered in step 106.



Once all of the relevant data for each influencer is obtained, processing continues with step 110 of **Figure 1**.

**Figures 8-10** are a series of screen shots, according to one embodiment of the system, that walk the user through steps 104, and 120-136. Each of **Figures 8-10** includes an “add” command button that gives the user the ability to add multiple factors, influences, or weights, respectively, to the system.

### **Risk reduction**

Further processing of the data takes place in step 110. Here, the system conditionally branches to step 114 where an action plan is generated only if the risk-to-importance ratio is not too high. Specifically, the ranking data gathered in steps 122, 130, 132, and 134 are fed into a formula used as the branch condition: in one embodiment, if D, H, and I are greater than five, ranked on a scale from one to ten, AND J is greater than five, ranked on a scale of one to ten, then the risk is too high. The risk must be reduced before processing can continue and an action plan can be generated. This risk-reduction technique involves an iterative process of querying the user in one or more “subsets.” Each subset is processed as long as the aforementioned condition of  $D > 5$  and  $I > 5$  and  $H > 5$  and  $J > 5$  is met for each. If the condition is not met for a particular subset of the data gathered from previous steps, then risk-reduction for that subset is bypassed. The risk-reduction process is further elucidated in the following paragraph.

The step of reducing the risk to an acceptable level, step 112 of **Figure 1**, is explained further in steps 140-146 of **Figure 3**. In step 140, the system displays the list of ways to positively affect the influencers that was gathered in step 128 for each of the

influencers (G). Step 142 prompts for user input on how to reduce the risk associated with affecting the particular influencer (K). Weights (L) are applied to the importance of taking the action that was given in step 142. In one embodiment, this weight is input as a ranking on a scale of one to ten. Finally, a second conditional branch is entered in step 146. If the value of L is less than five, processing will loop back through steps 140-146 until a value of L greater than or equal to five is achieved. Once achieved, processing continues at step 114 where the generation of an action plan begins.

#### **Producing the action plan**

The step of generating an action plan, step 114 of **Figure 1**, is explained in detail in **Figure 4**. In step 150 of **Figure 4**, the influencing factors (B) are prioritized by weight of the influencer on the outcome as was specified by the user in step 122 of **Figure 2**. In step 152 the list of affecting influences (G) are prioritized according to the weights which were supplied by the user in step 130 of **Figure 2**. In step 154, the list of affecting influences is further prioritized according to the risk weight (I) and willingness weight (J) that were supplied by the user in steps 132 and 134 respectively. Lastly, in step 156, if necessary, the risk reduction actions and risk reduction weights are prioritized based on the statement(s) and weight(s) that may have been gathered from the user in steps 142 and 144 in **Figure 3**. Steps 150-154 use a formulaic approach that we summarize as follows:

#### **Formula for producing an action plan**

The functions used to produce the user's action plan are outlined below:

1. Step 150 -- Prioritize influencing factors (B) by (D) = D2
2. Step 152 -- Prioritize list of Affecting Drivers (G) by (H) = H2

3. Step 154 -- Further prioritize (drill down) list of Affecting Drivers (H2) by

$$I+J = IJ$$

Each of the results derived by the formulas mentioned here incorporate the weights entered by the user. Step 150 applies the user-supplied weight (D) from step 122 to the particular influencer (B). Step 152 applies the user-supplied weight (H) from step 128 to the particular statement about how to affect the influencer (G). And step 154 applies the user-supplied risk weight (I) and willingness weight (J) from steps 132 and 134 to the prioritized list of affecting drivers from step 152. In this manner, the list of influencing factors is prioritized for use in the development of the action plan.

#### **Displaying an action plan**

**Figure 5** describes the step of displaying the action plan. Beginning with step 160, the system displays the vision from step 102, the goal from step 102, and the outcome or outcomes from step 104. In step 162, the action plan is displayed as determined by D2, H2, and IJ. And in step 164, the timeframe entered in step 126 is also displayed. As a final step in the methodology, the action plan may be optionally downloaded into a database, step 118. To one skilled in the relevant art, it is clear that the database of step 118 includes but is not limited to a personal information manager (PIM) such as ACT!™, Microsoft® Outlook®, a relational database management system, a personal digital assistant (PDA) such as a Palm™ handheld, or any other electronic database tool that is available or could in the future be made available for storing data.

Steps 160, 162, and 164 are likewise not intended to be limitations. A display device may take the form of a computer monitor, a portable computer display, a PDA

display, a CRT, an LCD, a plotter, a printer, or any such display device that is available or could in the future be made available for displaying data.

### Screenshots

The present invention contemplates a wizard-based approach to development of the  
5 final action plan. Wizards are commonly used in modern graphical user interfaces (GUI).  
A wizard walks a user through a process in a series of steps until arriving at a result.  
Common among wizard-based interfaces is the presence of a pair of command buttons on  
each screen that take the user forward to the next step and backward to the previous step,  
obviously with the exception of the first and final screens which only move a user forward  
10 or backward, respectively. Forward and backward navigation is accomplished in the  
present invention through the presence of the Next and Back command buttons shown in  
the sample screenshots of **Figures 6-12**.

The sample screenshots of **Figures 6-12** are designed using standard GUI  
application development controls, which include labels, textboxes, listboxes, command  
15 buttons, and comboboxes. The present invention expressly contemplates a GUI interface,  
although a less sophisticated command-line interface or menu-driven interface is within the  
scope of the present invention. Additionally, a world-wide-web-based implementation  
coded in HTML, DHTML, XML or their progeny is further contemplated by the inventor.  
Lastly, the present invention contemplates implementations that use embryonic or yet-to-  
20 be-conceived interface technology including voice recognition, touch screens, and virtual  
reality.

### Final action plan

**Figure 12** is an example screenshot displaying the final action plan. The final action plan addresses the steps the user must take to reach his or her goal as determined by formulas D2, H2, and IJ. The final action plan shows the user that he or she can reach the stated goal from step 102 by applying the statements obtained in (E) step 124 and (G) step 128. Further, each influencer (obstacle) specified in (B) step 106, is listed along with a creative solution for overcoming that obstacle. The timeframe entered in (F) step 126 reminds the user of the specific date by which the goal should be reached. Applying this to our example above, the final action plan displayed for the user might look like:

10        To Accomplish the Vision:    Making \$50,000 to invest and put children through school.

          You can reach your goal:     Sell top-end system and meet/exceed quota

          If you:                      Offer to sponsor a charity bike ride

          By:                          July 18th Board Meeting

15        And, if you:    Make a proposal offering the best price

          By:                          This week

A New Vision command button allows the user to restart the personal development training system all over again, beginning with step 102, for a different vision and goal.

          One embodiment of the personal development training process includes a high-energy, motivational video segment showing the user achieving his or her vision. At or near the beginning of the system, the user is prompted to choose from a collection of images or photographs representing his or her conception of accomplishing the vision.

Examples include images and photographs of fun and relaxing sporting activities such as golfing, surfing, skiing, hiking, and snowboarding. At or near the end of the personal development training process, the system compiles and displays a sequence of related scenes put together in a short motivational video presentation that graphically symbolizes

5 the user's envisioned sense of accomplishment, reinforcing his or her chosen conception of the vision.

**Figure 13** is a block diagram illustrating an example computer system in which elements and functionality of the invention are implemented according to one embodiment of the present invention. The present invention may be implemented using hardware,  
10 software or a combination thereof and may be implemented in a computer system or other processing system. An exemplary computer system 1300 is shown in **Figure 13**. Various software embodiments are described in terms of this exemplary computer system 1300.

After reading this description, it will become apparent to a person having ordinary skill in the relevant art(s) how to implement the invention using other computer systems and/or  
15 computer architectures.

Referring now to **Figure 13**, the computer system 1300 includes one or more processors, such as processor 1304. Additional processors may be provided, such as an auxiliary processor to manage input/output, an auxiliary processor to perform floating point mathematical operations, a digital signal processor (a special-purpose microprocessor  
20 having an architecture suitable for fast execution of signal processing algorithms), a back-end processor (a slave processor subordinate to the main processing system), an additional microprocessor or controller for dual or multiple processor systems, or a coprocessor. It

will be recognized that such auxiliary processors may be discrete processors or may be built in to the processor 1304.

The processor 1304 is connected to a communication bus 1302. The communication bus 1302 may include a data channel for facilitating information transfer  
5 between storage and other peripheral components of the computer system 1300. The communication bus 1302 further provides the set of signals required for communication with the processor 1304, including a data bus, address bus, and control bus (not shown). The communication bus 1302 may comprise any known bus architecture according to promulgated standards, for example, industry standard architecture (ISA), extended  
10 industry standard architecture (EISA), Micro Channel Architecture (MCA), peripheral component interconnect (PCI) local bus, standards promulgated by the Institute of Electrical and Electronics Engineers (IEEE) including IEEE 488 general-purpose interface bus (GPIB), IEEE 696/S-100, and the like.

Computer system 1300 includes a main memory 1306 and may also include a  
15 secondary memory 1308. The main memory 1306 provides storage of instructions and data for programs executing on the processor 1304. The main memory 1306 is typically semiconductor-based memory such as dynamic random access memory (DRAM) and/or static random access memory (SRAM). Other semiconductor-based memory types include, for example, synchronous dynamic random access memory (SDRAM), Rambus dynamic  
20 random access memory (RDRAM), ferroelectric random access memory (FRAM), and the like, as well as read only memory (ROM).

The secondary memory 1308 may include, for example, a hard disk drive 1310 and/or a removable storage drive 1312, representing a floppy disk drive, a magnetic tape drive, an optical disk drive, etc. The removable storage drive 1312 reads from and/or writes to a removable storage unit 1314 in a well-known manner. Removable storage unit 5 1314, represents a floppy disk, magnetic tape, optical disk, etc. which is read by and/or written to by removable storage drive 1312. As will be appreciated, the removable storage unit 1314 includes a computer usable storage medium having stored therein computer software and/or data.

In alternative embodiments, secondary memory 1308 may include other similar 10 means for allowing computer programs or other instructions to be loaded into the computer system 1300. Such means may include, for example, a removable storage unit 1322 and an interface 1320. Examples of such include semiconductor-based memory such as programmable read-only memory (PROM), erasable programmable read-only memory (EPROM), electrically erasable read-only memory (EEPROM), or flash memory (block 15 oriented memory similar to EEPROM). Also included are any other removable storage units 1322 and interfaces 1320, which allow software and data to be transferred from the removable storage unit 1322 to the computer system 1300.

Computer system 1300 also includes a communications interface 1324. Communications interface 1324 allows software and data to be transferred between 20 computer system 1300 and external devices, networks or information sources. Examples of communications interface 1324 include a modem, a network interface (such as an Ethernet card), a communications port, a PCMCIA slot and card, etc. Communications interface



1324 preferably implements industry promulgated architecture standards, such as Ethernet IEEE 802 standards, Fibre Channel, digital subscriber line (DSL), asymmetric digital subscriber line (ASDL), frame relay, asynchronous transfer mode (ATM), integrated digital services network (ISDN), personal communications services (PCS), transmission control  
5 protocol/Internet protocol (TCP/IP), serial line Internet protocol/point to point protocol (SLIP/PPP), Data Over Cable Service Interface Specification (DOCSIS), and so on.

Software and data transferred via communications interface 1324 are in the form of signals which can be electronic, electromagnetic, optical or other signals capable of being received by communications interface 1324. These signals 1328 are provided to  
10 communications interface 1324 via a channel 1326. This channel 1326 carries signals 1328 and can be implemented using wire or cable, fiber optics, a phone line, a cellular phone link, a radio frequency (RF) link, infrared interface (IR) or other communications channels.

Computer programming instructions (also known as computer programs or software) are stored in the main memory 1306 and/or the secondary memory 1308.  
15 Computer programs can also be received via communications interface 1324. Such computer programs, when executed, enable the computer system 1300 to perform the features of the present invention as discussed herein. In particular, the computer programs, when executed, enable the processor 1304 to perform the features and functions of the present invention. Accordingly, such computer programs represent controllers of the  
20 computer system 1300.

In this document, the term “computer program product” is used to refer to any media used to provide programming instructions to the computer system 1300. Examples

of these media include removable storage unit 1314, removable storage unit 1322, a hard disk installed in hard disk drive 1310, and signals 1328. These computer program products are means for providing programming instructions to the computer system 1300

In an embodiment where the invention is implemented using software, the software may be stored in a computer program product and loaded into computer system 1300 using hard drive 1310, removable storage drive 1312, interface 1320 or communications interface 1324. The software, when executed by the processor 1304, causes the processor 1304 and/or the computer system 1300 to perform the features and functions of the invention as described herein.

In another embodiment, the invention is implemented primarily in hardware using, for example, hardware components such as PALs or application specific integrated circuits (ASICs). Implementation of the hardware state machine so as to perform the functions described herein will be apparent to persons having ordinary skill in the relevant art(s).

In yet another embodiment, the invention is implemented using a combination of both hardware and software. It should be appreciated that modification or reconfiguration of the computer system 1300 of **Figure 13** by one having ordinary skill in the relevant art(s) will not depart from the scope or the spirit of the present invention. While particular embodiments of the present invention have been described above, it should be understood that they have been presented by way of example only, and not as limitations. The breadth and scope of the present invention is defined by the following claims and their equivalents, and is not limited by the particular embodiments described herein.